

# OFFICE OF FINANCIAL MANAGEMENT

## BUDGET AND ALLOTMENT SUPPORT SYSTEMS (BASS)

### *Performance Measure Tracking (PMT) System*

### *Performance Measure Quarterly Estimates & Tracking*

---

*Version 1.2 Final  
July 2005*




## Table of Contents

<b>ABOUT THIS TUTORIAL .....</b>	<b>5</b>
LESSON 1 – PROPOSE NEW PERFORMANCE MEASURES .....	7
LESSON 2 – EDIT EXISTING PERFORMANCE MEASURES .....	10
LESSON 3 – PERFORMANCE MEASURE FILTER .....	12
LESSON 4 – ENTERING BIENNIAL TRACKING ESTIMATES .....	16
LESSON 5 – DATA RELEASE TO OFM .....	19
LESSON 6 – RECALL A RELEASED MEASURE .....	20
LESSON 7 – CHANGE THE STATUS OF AN UNAPPROVED MEASURE .....	21
LESSON 8 – ENTER AND SUBMIT QUARTERLY ACTUALS .....	23
LESSON 9 – REPORTING .....	25
LESSON 10 – EXPORT DATA .....	30
<b>APPENDIX 1 - BUSINESS NOTES.....</b>	<b>34</b>
<i>Detail</i> .....	34
<i>Status</i> .....	34
<i>Filter</i> .....	34
<i>Release</i> .....	34
<i>Tracking</i> .....	35
<i>Reports</i> .....	35
<i>Export</i> .....	35
<b>TUTORIAL EVALUATION .....</b>	<b>36</b>



# ABOUT THIS TUTORIAL

This tutorial was developed to take budget staff through the sequential steps developing tracking estimates and quarterly actual amounts through the Performance Measure Tracking (PMT) system. This tutorial will not address performance measures for budget or budget version links, as these are not required for tracking an enacted budget. A separate tutorial will be available for developing performance measures for budget.

This tutorial can be used in a formal training session, for individual practice, or developing the agency budget request. Actual values to be entered when using for training or for practice are highlighted or presented on the accompanying Exercise Slip. If practicing on your own, please use your judgment to determine values to be used for practice or actual budget work. Each task is preceded by a brief explanation of the task and its importance in your budget development as well as general business rules. Specific business rules and recommendations for entering your budget are denoted with a  on the task. Appendix 1 contains a central listing of all the business rules.

Every effort is made to ensure that the PMT tutorial and OFM Allotment Instructions agree in every way. In case there is a discrepancy, the OFM Allotment Instructions take precedence. The OFM Allotment Instructions can be found at <http://www.ofm.wa.gov/budget/instructions/allotment.htm>. Please complete the Tutorial Evaluation at the back of this tutorial to report any discrepancies found.

Not every feature of PMT will be covered. The PMT Complete System Manual will be made available to users. That document explains every function of PMT screen by screen and is all-inclusive. It will be made available on-line in the BASS Library under the PMT reference desk (<http://systems.ofm.wa.gov/basspr/library/pmtes.html> or <https://fortress.wa.gov/ofm/systems/basspr/library/pmtes.html>) for Fortress users. Full documentation on all BASS products is available in the BASS Virtual Library available on-line at <http://systems.ofm.wa.gov/basspr/library/default.htm> or <https://fortress.wa.gov/ofm/systems/basspr/library/default.htm> for Fortress users. The library may also be accessed by the help links available in all BASS applications.



## Lesson 1 – Propose New Performance Measures

The list of performance measures submitted with the agency budget request may require change once a budget is enacted and the funding appropriated to support activities is known. Also, new legislation may create the need to track new measures. The Allotment Instructions provide for agencies to propose new measures by entering and submitting through PMT. This lesson will walk you through the process of entering new measures for proposal.

1. Open Internet Explorer and enter the login address  
<http://systems.ofm.wa.gov/basspr/login/login.asp> (or  
<https://fortress.wa.gov/ofm/systems/basspr/login/login.asp> for Fortress users) in the address bar of the browser.  
If in a training session, skip this step
2. Use your login ID and password to log in to BASS. *If you do not have a login ID and password, a security form is included in the back of the tutorial. Follow the instructions on the form.*  
10500training  
training
3. Select the graph icon for **Performance Measure Tracking (PMT)** System.



4. Review the list of performance measures to determine any new measures needed for the ensuing biennium.

Agency: 105

File Edit View Tools Reports Help

Performance Measure Selection

Select a Performance Measure from the list

Performance Measure	Status	Program	Fields Locked
1001 Number of students trained	Approved	<Unassigned>	N
1002 Average number of approved/published measures per agency	Approved	<Unassigned>	N
1003 Total number of measures published by OFM	Approved	<Unassigned>	N
1004 Percentage of decision packages with linked performance measures	Approved	<Unassigned>	N

Select a Performance Measure from the list

Version 2.0.1

5. Select **Edit / Add Performance Measure** to bring up a blank entry screen.

**Agency: 105**

File Edit View Tools Reports Help

Code Short Title (Non-Published)

Performance Measure Detail Performance Measure Tracking

Status Type Unit Program

Edit <> <> <Unassigned>

Statement of Measure (Published) Footnotes (Published)

Other Notes (Non-Published)

Enter Detail for the New Performance Measure Version 2.0.0

- Enter the performance measure detail to describe the new performance measure being proposed.

**Code** – See exercise slip

**Short Title** – POG Measures

**Status** – Not editable (retains status of Edit until released to OFM)

**Type** – Outcome

**Unit** – Number

**Program** – <Unassigned> (Optional field for segregating performance measure by program. Performance Measure must belong to only one program or it cannot be assigned.)

**Statement of Measure** – The number of performance measures submitted to, approved, and published by OFM that support the Priorities of Government Statewide Result Areas.

**Footnotes** – Does not include measures that are not published.

**Other Notes** - <leave blank>



**Agency: 105**

File Edit View Tools Reports Help

Code Short Title (Non-Published)

1005 PDG Measures

Performance Measure Detail Performance Measure Tracking

Status Type Unit Program

Edit Outcome Number <Unassigned>

Statement of Measure (Published)

The number of performance measures submitted to, approved, and published by OFM that support the Priorities of Government Statewide Result Areas.

Footnotes (Published)

Measures not published are not included.

Other Notes (Non-Published)

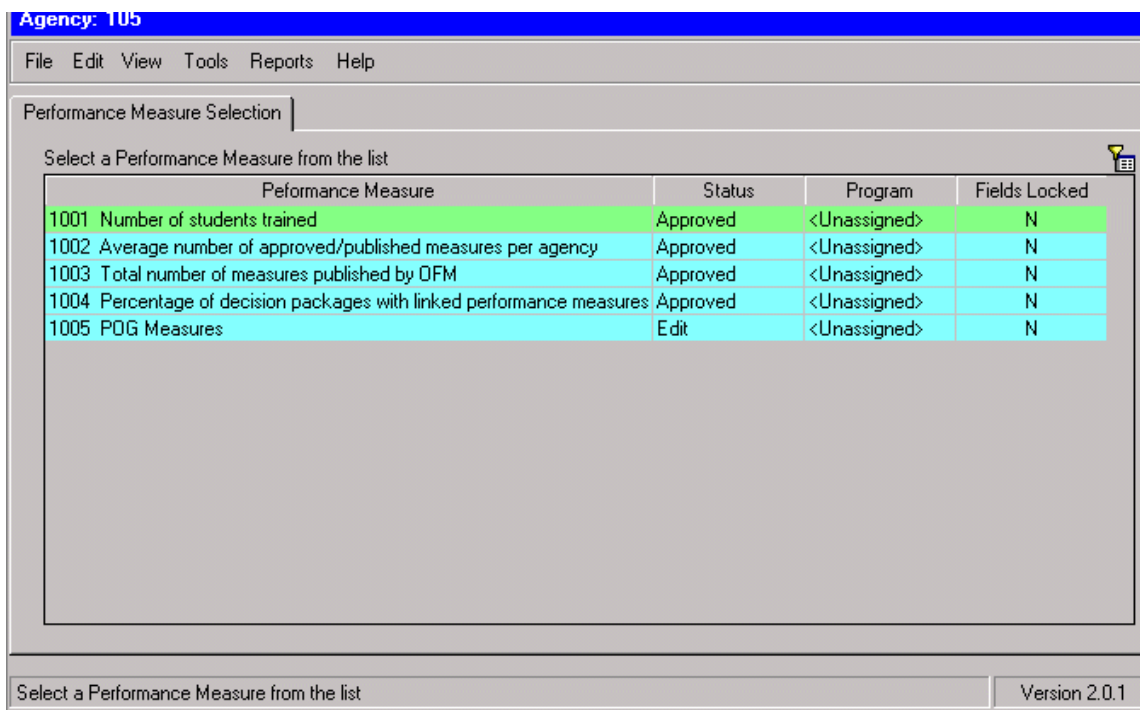
Enter Detail for the New Performance Measure Version 2.0.1

7. Select **File / Save Changes** from the PMT Menu bar. *Note: The performance measure will be submitted to OFM as a new proposal when performance measure tracking data is released. This will be covered in **Lesson 5 – Data Release to OFM**.*
8. Repeat for each new proposed measure.

## Lesson 2 – Edit Existing Performance Measures

As part of the performance measure review process you may determine that an element of a performance measure description needs to be adjusted. You will need to enter estimates in each quarter has appropriate to indicate the level achievable given funding received.

1. Select **View / Performance Measure Selection** from the **PMT Menu** bar. *Note: Notice that the new measure has a status of “Edit”. This is because the measure has not yet been submitted to OFM. More on performance measure status in **Lesson 3 – Performance Measure Filter**.*



Agency: 1005

File Edit View Tools Reports Help

Performance Measure Selection

Select a Performance Measure from the list

Performance Measure	Status	Program	Fields Locked
1001 Number of students trained	Approved	<Unassigned>	N
1002 Average number of approved/published measures per agency	Approved	<Unassigned>	N
1003 Total number of measures published by OFM	Approved	<Unassigned>	N
1004 Percentage of decision packages with linked performance measures	Approved	<Unassigned>	N
1005 PDG Measures	Edit	<Unassigned>	N

Select a Performance Measure from the list

Version 2.0.1

2. Double click to open the measure for editing.  
See exercise slip

**Agency: 105**

File Edit View Tools Reports Help

Code Short Title (Non-Published)

1001 Number of students trained

Performance Measure Detail Performance Measure Tracking

Status Type Unit Program

Edit Output Number <Unassigned>

Statement of Measure (Published) Footnotes (Published)

The number of students completing formal PMT training. Number is cumulative. Quarters 1 and 7 are expected to realize an increase based on the business cycle for performance measures estimating and budget development.

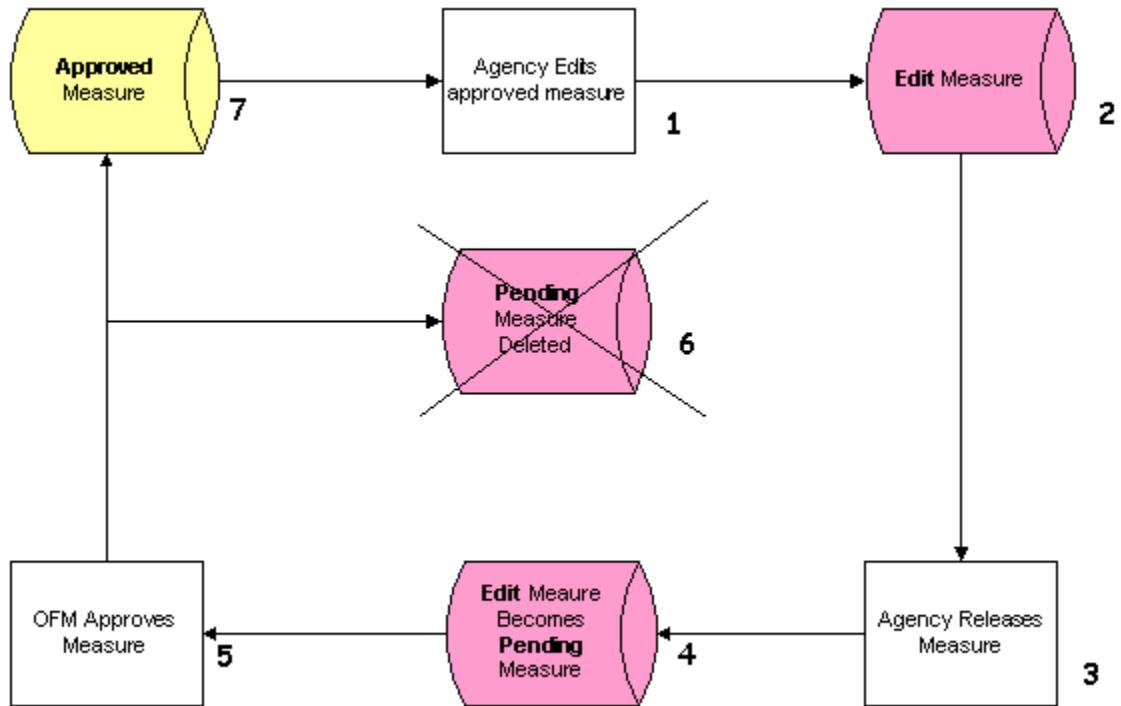
Other Notes (Non-Published)

Edit Performance Measure Detail Version 2.0.1

3. Update the descriptive elements as necessary.  
Update footnote to explain periodic spikes; “Quarters 1 and 7 are expected to realize an increase based on the business cycle for performance measures estimating and budget development.”
4. Select **File / Save Changes** from the **PMT Menu** bar.
5. Repeat for each measure requiring descriptive changes.

### Lesson 3 – Performance Measure Filter

PMT provides the ability to filter performance measures based on program or status. Status is determined by the system depending on the last action taken on a performance measure and a measure may have more than one status. The below diagram and narrative explain the status concept using just one example of status changes. The PMT Filter option allows you to change the type of measure you are viewing from the default (e.g., view approved instead of edit to see the last approved copy). This lesson will walk through the filter options to give you practice with status, program, and the filter.



1. Agency makes a change to an **Approved** measure.
2. A copy of the **Approved** measure is made and saved as an **Edit** copy. There are now two instances of the performance measure, **Approved** and **Edit**.
3. The agency releases the **Edit** measure to OFM.
4. The **Edit** measure is updated with a status of **Pending**. There are still two copies of the measure, **Approved** and **Pending**.
5. OFM approves the **Pending** measure.
6. The **Pending** measure becomes **Approved**.
7. There is now only one copy of the performance measure, **Approved**.

1. Select **View / Performance Measure Selection** from the **PMT Menu** bar.
2. Select **View / Set Performance Measure Filter**.



**Agency: 105**

File Edit View Tools Reports Help

Performance Measure Selection

Select a Performance Measure from the list

Performance Measure	Status	Program	Fields Locked
1001 Number of students trained	Edit	<Unassigned>	N
1002 Average number of approved/published measures per agency	Approved	<Unassigned>	N
1003 Total number of measures published by OFM	Approved	<Unassigned>	N
1004 Percentage of decision packages with linked performance measures	Approved	<Unassigned>	N
1005 POG Measures	Edit	<Unassigned>	N

Select a Performance Measure from the list

Version 2.0.1

- Review the list and take note that each measure only appears once although based on the diagram above there should be two measures for the measure edited in the previous lesson.  
*Note: PMT assumes a hierarchy of how to display measures so you see only one copy when multiple statuses have been selected in the filter. The filter allows you to establish the status you to set the statuses to view by selecting one status at a time.*
- Open the first measure in the list.

**Agency: 105**

File Edit View Tools Reports Help

Code: 1001 Short Title (Non-Published): Number of students trained

Performance Measure Detail Performance Measure Tracking

Status: Edit Type: Output Unit: Number Program: <Unassigned>

Statement of Measure (Published): The number of students completing formal PMT training.

Footnotes (Published): Number is cumulative. Quarters 1 and 7 are expected to realize an increase based on the business cycle for performance measures estimating and budget development.

Other Notes (Non-Published):

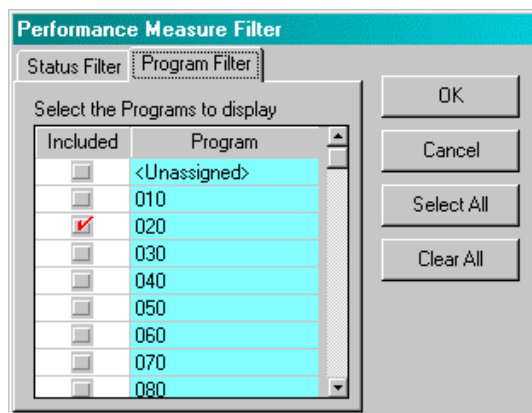
Records Saved Successfully

Version 2.0.1

- Use the navigation arrows on either side of the performance measure **Code** to scroll through your measures.

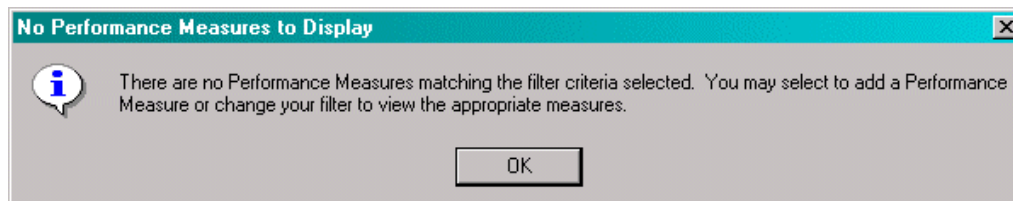
10. Reselect the **View / Set Performance Measure Filter**.

11. Select the **Program Filter** tab. *Note: Programs available for selection are defined by programs in AFRS.*

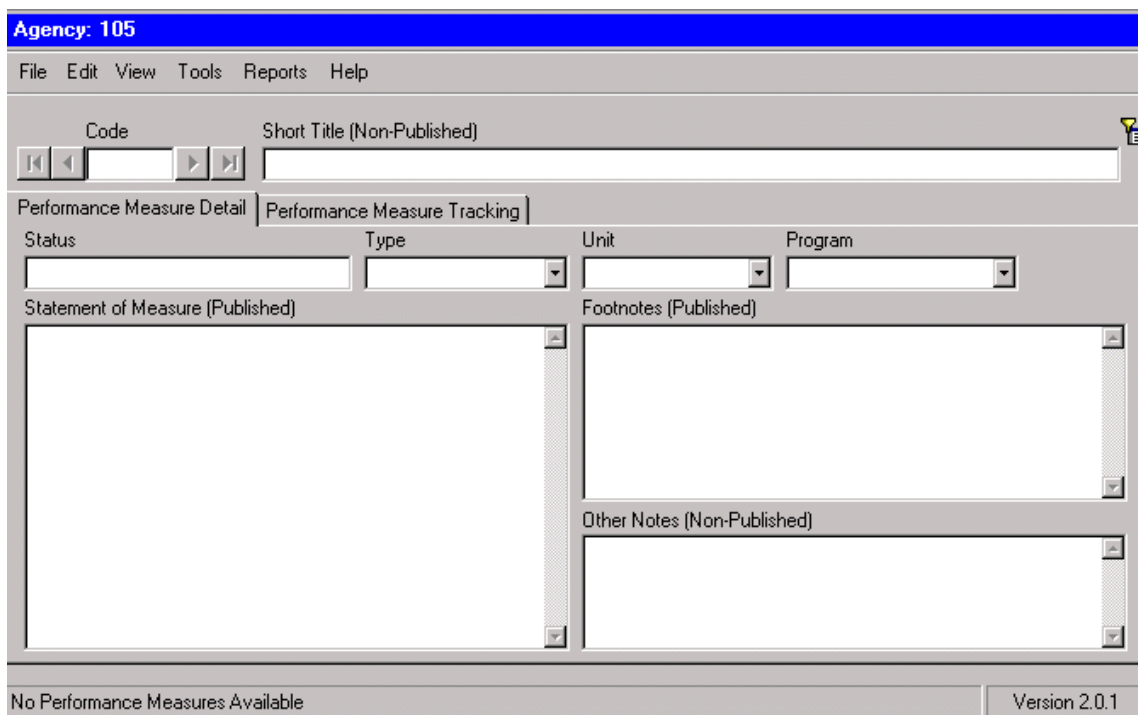


12. Select filter on a single **Program** and click **OK**.

**Program 010**



13. Review the resulting screen. *Note: You need to either add a performance measure to match the filter selected or change the filter to continue using this screen.*

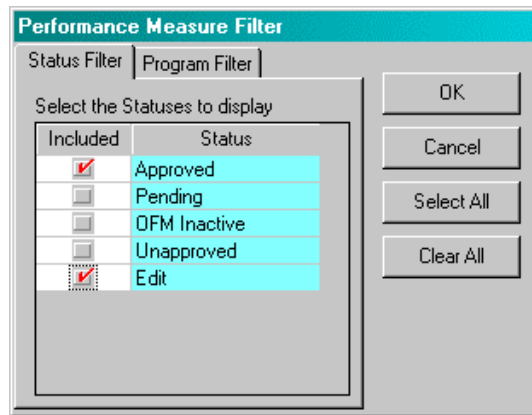


14. Take a few moments to try different combinations of status and program filters and use the navigation arrows within descriptions.

## Lesson 4 – Entering Biennial Tracking Estimates

Now that you all the performance measures are entered and edited and you have some practice navigating and using the filter and scroll buttons you are ready to enter quarterly estimates for the ensuing biennium.

1. Select **View / Performance Measure Selection** from the **PMT Menu** bar.
2. Select **View / Set Performance Measure Filter** from the **PMT Menu** bar.
3. Set the **Status Filter** to include **Approved** and **Edit** measures. *Note: **Approved** measures will become **Edit** measures once you enter the tracking estimates. Tracking is not required for **OFM Inactive** or **Unapproved** measures.*



4. Set the **Program Filter** to include all programs by clicking the **Select All** button. *Note: You may choose to limit the filter to one program if you have a large number of measures segregated by program. But for most agencies selecting all programs will allow you to get all estimates in at one time.*
5. Click **OK** to apply the filter.
6. Double click to open a measure requiring biennial estimates.  
**See exercise slip**
7. Select the **Performance Measure Tracking** Tab.



**Agency: 105**

File Edit View Tools Reports Help

Code Short Title (Non-Published)

1001 Number of students trained

Performance Measure Detail Performance Measure Tracking

Biennium Tracking Amounts (Number)

Biennium		Estimate	Actual	Date	Comments (Published)
2005-07*					
2003-05	Q1	100.00	0.00		
2001-03	Q2	130.00	0.00		
	Q3	165.00	0.00		
	Q4	205.00	0.00		
	Q5	360.00	0.00		
	Q6	405.00	0.00		
	Q7	450.00	0.00		
	Q8	500.00	0.00		

Edit Performance Measure Detail Version 2.0.1

8. Select the current biennium from the **Biennium** box.
9. Enter estimates into the appropriate quarters. *Note: **Date Measured** and **Comments** are intended for optional use when entering actual performance measures. This will be covered in Lesson 8 – Enter and Submit Quarterly Actuals.*  
See picture above for values
10. Select the **Next** navigation button to move to the next measure.

**Save changes?**

There are pending changes on this screen. Do you wish to save the changes to the Database?

Yes No Cancel

11. Click **Yes** to save pending changes. *Note: While you can navigate between tabs for the same measure without saving, you are required to save before moving to another measure.*

**Agency: 105**

File Edit View Tools Reports Help

Code Short Title (Non-Published)

1002 Average number of approved/published measures per agency

Performance Measure Detail Performance Measure Tracking

Biennium Tracking Amounts (Number)

	Estimate	Actual	Date	Comments (Published)
2005-07*				
2003-05	3.00	0.00		
2001-03	0.00	0.00		
	4.00	0.00		
	0.00	0.00		
	0.00	0.00		
	0.00	0.00		
	0.00	0.00		
	5.00	0.00		
	0.00	0.00		

Edit Performance Measure Detail Version 2.0.1

12. Enter estimates in the appropriate quarters for the next measure.  
See picture above for values.
13. Select **File / Save Changes** and then move on to the next measure.
14. Repeat for each measure.

## Lesson 5 – Data Release to OFM

Once your performance measures are up to date and quarterly estimates have been entered you are ready to release to OFM. This process will release all measures with a status of **Edit** and change the status to **Pending** indicating OFM will review and approve or unapproved your proposed Performance Measure changes and estimates.

1. Select **File / Exit Performance Measures** to return to the **BASS Main Menu**. *Note: Releasing performance measures takes place in the BASS Data Release system. Special security is required for permission to release performance measure data. Users without this special permission will not have access.*
2. Select the **Release Date to OFM** icon from the BASS Main Menu.



3. Select the **PMT** tab.

4. Select the '**Release all PMT descriptive and tracking data**' from the **Release Type** dropdown box.
5. Click the **Release** button.  
**DO NOT RELEASE DATA IN A TRAINING SESSION OR WHEN PRACTICING ON YOUR OWN.**
6. Return to the **Main Menu**.
7. Select the **PMT** icon to return to the Performance Measure Tracking system. *Note: All performance measures that had a status of **Edit** now have a status of **Pending**. Approved measures retain their status since there were no changes submitted to OFM.*

## Lesson 6 – Recall a Released Measure

PMT allows users to update a measure after it has been released as long as the measure is still in **Pending** status. This allows you to easily edit a released measure and resubmit.

1. Double click to open the measure requiring change and note the **Pending** status on the **Performance Measure Detail** tab.

See exercise slip

Agency: 105

File Edit View Tools Reports Help

Code: 1002 Short Title (Non-Published): Average number of approved/published measures per agency

Performance Measure Detail Performance Measure Tracking

Biennium: 2005-07\*, 2003-05, 2001-03

Tracking	Amounts (Number)				
	Estimate	Actual	Date	Comments (Published)	
Q1	4.00	0.00			
Q2	0.00	0.00			
Q3	5.00	0.00			
Q4	0.00	0.00			
Q5	0.00	0.00			
Q6	0.00	0.00			
Q7	6.00	0.00			
Q8	0.00	0.00			

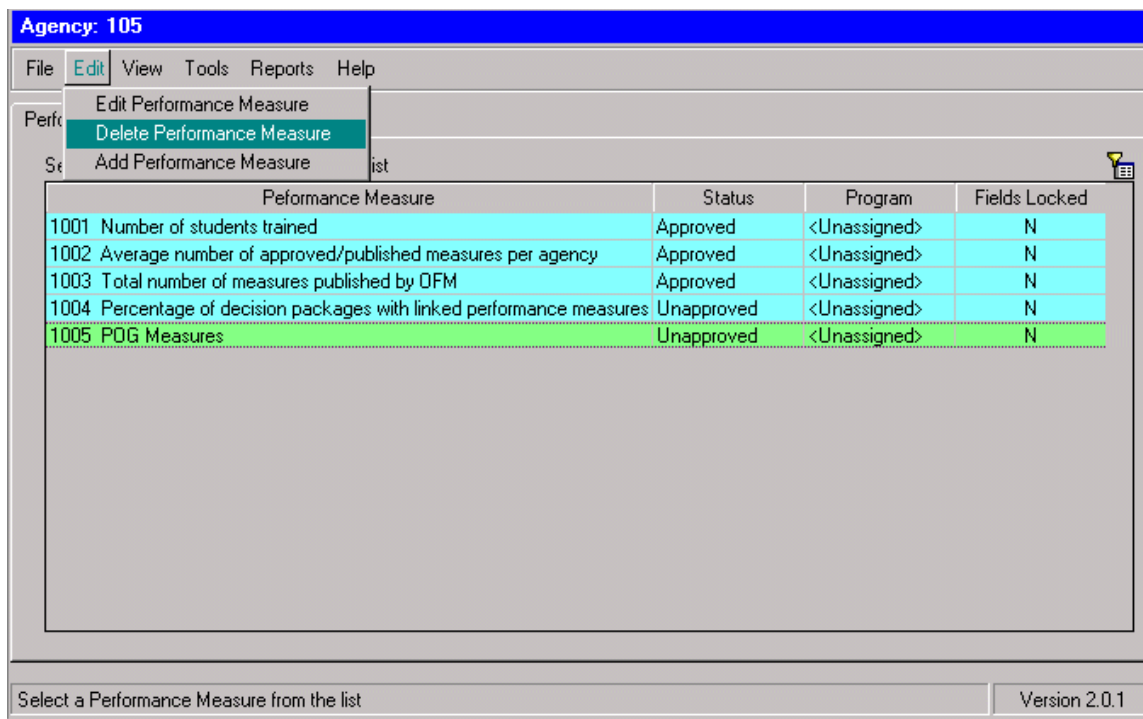
Edit Performance Measure Detail Version 2.0.1

2. Make required changes to the Detail and Amounts tabs and select **File / Save Changes** from the **PMT Menu** bar.  
See picture above for values
3. Select the **Performance Measure Detail** tab and note that the status now reads **Edit**. *Note: Any change made to any performance measure will result in a status change to **Edit**.*
4. Follow the steps in **Lesson 5 – Data Release to OFM** to release changes to OFM.

## Lesson 7 – Change the Status of an Unapproved Measure

OFM has the ability to unapproved a measure meaning it is not a measure they want to review or publish or there is a problem with it. It may be the entire measure itself, or it may be an element of the measure they are unapproving. At the time the analyst **Unapproves** a measure you will receive an e-mail alerting you to this fact as well as a reason. This step will walk through the appropriate actions to take; delete or fix and resubmit.

1. Return to the **Performance Measure Tracking** system.
2. Select **View / Set Performance Measure Filter** from the PMT Menu bar.
3. Set the **Status Filter** to include only **Unapproved** measures and click **OK** to apply.
4. Click once to select a measure that was **Unapproved** and does not require resubmitting.  
**See exercise slip**
5. Select **Edit / Delete Performance Measure** from the **PMT Menu** bar.



6. Select **File / Save Changes** to permanently delete the performance measures. *Note: The measure is not deleted until you save changes.*
7. Double click to open a measure that requires update and resubmittal to OFM.  
**See exercise slip**
8. Make changes as required per notice of unapproval and **Save** changes.  
**See exercise slip**

**Agency: 105**

File Edit View Tools Reports Help

Code: 1004 Short Title (Non-Published): Percentage of decision packages with linked performance measures

Performance Measure Detail | Performance Measure Tracking

Status: Edit Type: Efficiency Unit: Percent Program: <Unassigned>

Statement of Measure (Published): The percent of agency submitted decision packages that include links to approved/published performance measures.

Footnotes (Published): Includes proposed measures that were approved with the agency budget submittal.

Other Notes (Non-Published):

Edit Performance Measure Detail Version 2.0.1

9. Follow the steps in **Lesson 5 – Data Release to OFM** to release changes to OFM.

## Lesson 8 – Enter and Submit Quarterly Actuals

OFM requires that agencies submit actual performance measure results each quarter within 30 days of the end of the quarter. This lesson will walk through the entry and submitted of performance measures actual.

1. Return to the **Performance Measure Tracking** system. *Note: The default filter for PMT is for measure in **Approved** or **Edit** status and should meet the need for entering tracking amounts.*
2. Double click to open the first measure with actuals to be entered for the reporting quarter.  
**See exercise slip**
3. Select the **Performance Measure Tracking** tab.

Agency: 105

File Edit View Tools Reports Help


Code: 1001 Short Title (Non-Published): Number of students trained

Performance Measure Detail Performance Measure Tracking

Biennium	Tracking Amounts (Number)	Estimate	Actual	Date	Comments (Published)
2005-07*	Q1	100.00	79.00	09/30/2005	Overestimated training needs for initial rollout.
2003-05	Q2	130.00	0.00		
2001-03	Q3	165.00	0.00		
	Q4	205.00	0.00		
	Q5	360.00	0.00		
	Q6	405.00	0.00		
	Q7	450.00	0.00		
	Q8	500.00	0.00		

Edit Performance Measure Detail Version 2.0.1

4. Enter the actual amount realized in the appropriate quarter.  
**See picture for values**
5. You may optionally enter a data that the measure was taken. This is especially helpful if the measure data is not the last day of the quarter. *Note: The date of the last quarter measured will appear on reports when a date is entered.*  
**See picture for values**
6. You may optionally enter a comment regarding that quarter's measure. Comments should be reserved to record anomalies in data. *Note: The comments of the last quarter measured will appear on reports when a comment is entered.*  
**See picture for values**
7. Select **File / Save Changes** from the **PMT Menu** bar to save changes.

8. Click on the right arrow navigation button to move to the next measure for entry.
9. Repeat steps 4 through 8 for each measure to be recorded.
10. Follow the steps in **Lesson 5 – Data Release to OFM** to release data to OFM.  *Note: You can recall a measure to adjust the amounts entered by following the steps in **Lesson 6 – Recall a Released Measure**.*



## Lesson 9 – Reporting

Performance Progress reports are available for viewing performance measures tracking and actuals. These reports are available in the Enterprise Reporting (aka Fastrack) system. This system allows more flexibility in the development of reports and reporting options. This lesson will explore running reports using Enterprise Reporting.

### Very important note regarding reports

Reports use activities as found in Activity Descriptions of BDS. You will need two things to get proper reporting from the system.

1. You must know the version in BDS that has the most up to date Activity Descriptions. In most cases this will be the version that the agency submitted, or will submit, to OFM for the Enacted Recast. Check BDS or contact your budget staff for this information.
  2. Performance measures must be linked to an activity in the BDS version. If you have BDS access you can make this link yourself as described in the BDS Basic Budget tutorial on page 15. You will need to make sure any newly added performance measures get linked to an activity before running reports.
1. Return to the Performance Measure Tracking (PMT) System. *Note: It is not required that you go to PMT to get performance measure reports. You can go straight to Enterprise Reporting with your browser and log in as you normally would for Fastrack reports.*
  2. Select **Reports / Launch Enterprise Reporting** from the **PMT Menu** bar.

The screenshot shows the PMT System interface for Agency 105. The 'Reports' menu is open, highlighting the 'Launch Enterprise Reporting' option. Below the menu, a table lists performance measures with columns for Performance Measure, Status, Program, and Fields Locked.

Performance Measure	Status	Program	Fields Locked
1001 Number of students trained	Pending	<Unassigned>	N
1002 Average number of approved/published measures per agency	Pending	<Unassigned>	N
1003 Total number of measures published by OFM	Pending	<Unassigned>	N
1004 Percentage of decision packages with linked performance measures	Pending	<Unassigned>	N

At the bottom of the interface, there is a status bar with the text 'Select a Performance Measure from the list' and 'Version 2.0.1'.

3. Enter your Enterprise Reporting login ID and password on the login screen and login.

The screenshot shows the login page of the Washington State Enterprise Reporting system. The browser window title is "Enterprise Reporting - Logon - Microsoft Internet Explorer". The address bar shows the URL "http://reporting.ofm.wa.gov/loginform.csp?actic". The page features a large watermark of the Washington State seal. The main heading is "Welcome to Washington State's Enterprise Reporting". Below this, there are links for "What's New?", "User's Guide", "References", "Help Desk: (360) 664-7791", "Contact Support", "New User", and "Privacy Notice". The central text reads "Home of the FASTRACK Financial Reports, TALS Expenditure Authority Reports, and TVS Performance Report". The login form includes fields for "User Name:" (containing "train105"), "Password:" (containing "\*\*\*\*\*"), and "Authentication:" (a dropdown menu set to "Enterprise"). A "Log On" button is located below the authentication dropdown. The status bar at the bottom shows "Done" and "Internet".

4. Select the **BASS** then **PMT** folder.  
When in training the folder will be BASS / Training / PMT
5. Click on **Schedule** from the **PMT001** report.

The screenshot shows the "available.csp" page of the Washington State Enterprise Reporting system. The browser window title is "Enterprise Reporting - Microsoft Internet Explorer". The address bar shows the URL "http://reporting.ofm.wa.gov/available.csp". The page has a blue header with "Enterprise Reporting" and "Help Desk: (360) 664-7791". Below the header is a search bar with a "Go" button. The breadcrumb navigation shows "Home" > "Favorites" > "BASS" > "Training" > "PMT". Under the "Folders" section, it says "No folders". A table lists the available reports, with the first entry being "PMT001 - Performance Progress by Agency, Activity". Below this entry are links for "Schedule", "Schedule with Selection Values", and "History". The status bar at the bottom shows "Internet".

6. Select the values needed to run your report in the dropdown boxes and when all selections are made click any of the **Add** buttons. *Note: Clicking the **Add** button next to any field will add all selections made in this screen to the report parameters.*

Budget Period – 2005-07

Agency – 105

Version – TR

Status – PE - Pending

Default values on the remaining selections

**Budget Period:**  
New value: 2005-07 Add  
Current value: 2005-07

**Agency:**  
New value: 105 - Office of Financial Management Add  
Current value: 105

**Program:**  
New value: \* Default Values: Add  
Current value: \*

**Version:**  
New value: TR Default Values: Add  
Current value:

**Status:**

7. Click **Schedule** in the upper right hand corner of the screen.

Enterprise Reporting - History - Microsoft Internet Explorer

## History


⚡ Refresh | ✕ Cancel

PMT001 - Performance Progress by Agency, Activity

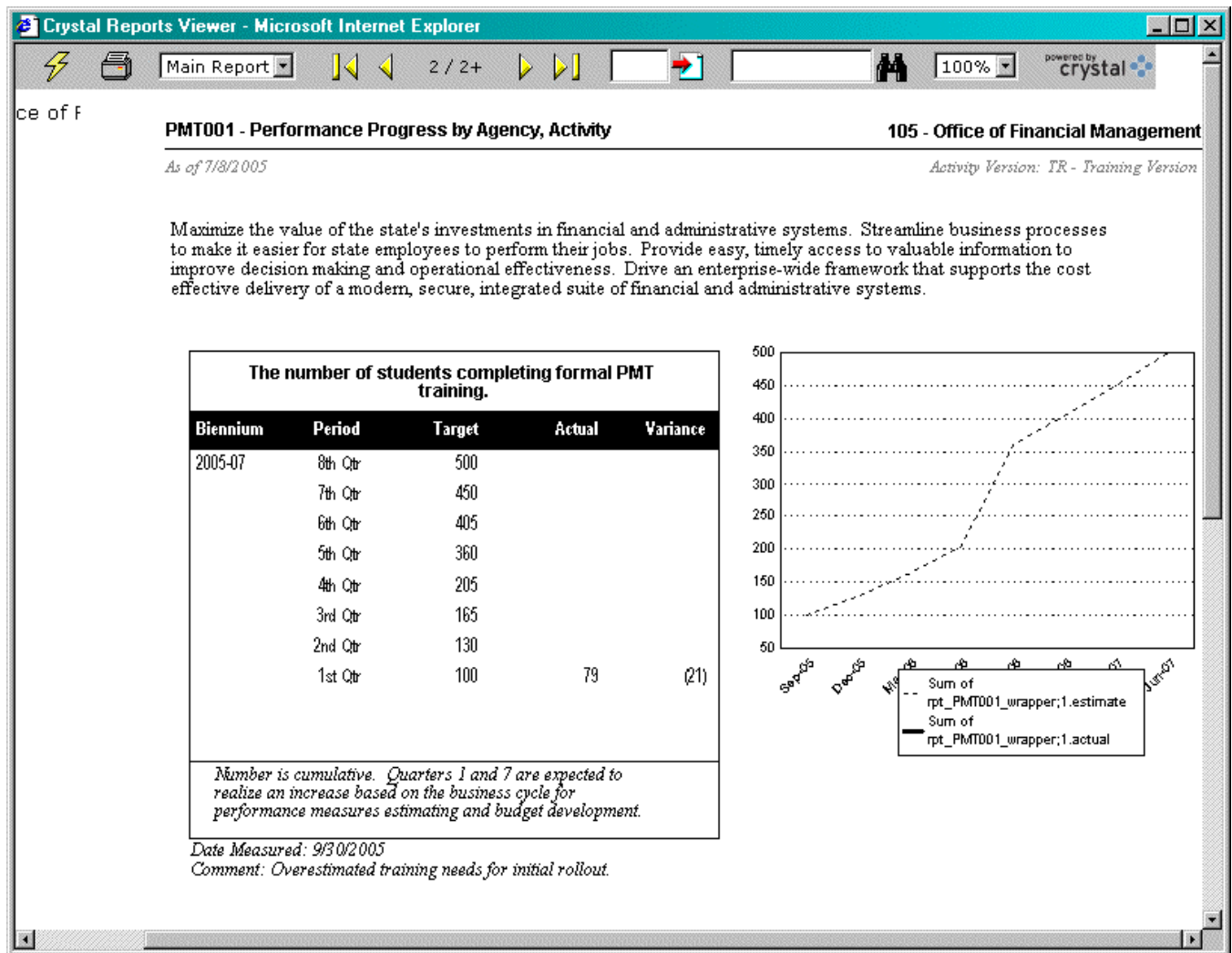
Status:  User:  Date:

---

Instances: 1

▼ Instance Time:	Run By:	Parameters/Reschedule:	Format:	Status:	Selected:
 7/8/2005 2:42:17 PM	train105	; 2005-07; 105; *; TR; OI; 2005-07; Y; Y; Y; A <a href="#">ReSchedule</a>   <a href="#">ReSchedule with Selection Values</a>	Crystal Report	Pending	<input type="checkbox"/>

8. Wait a few moments and click **Refresh**, repeat until the report status indicates **Success**.
9. Click on the **Instance Time** once the status is **Success**.

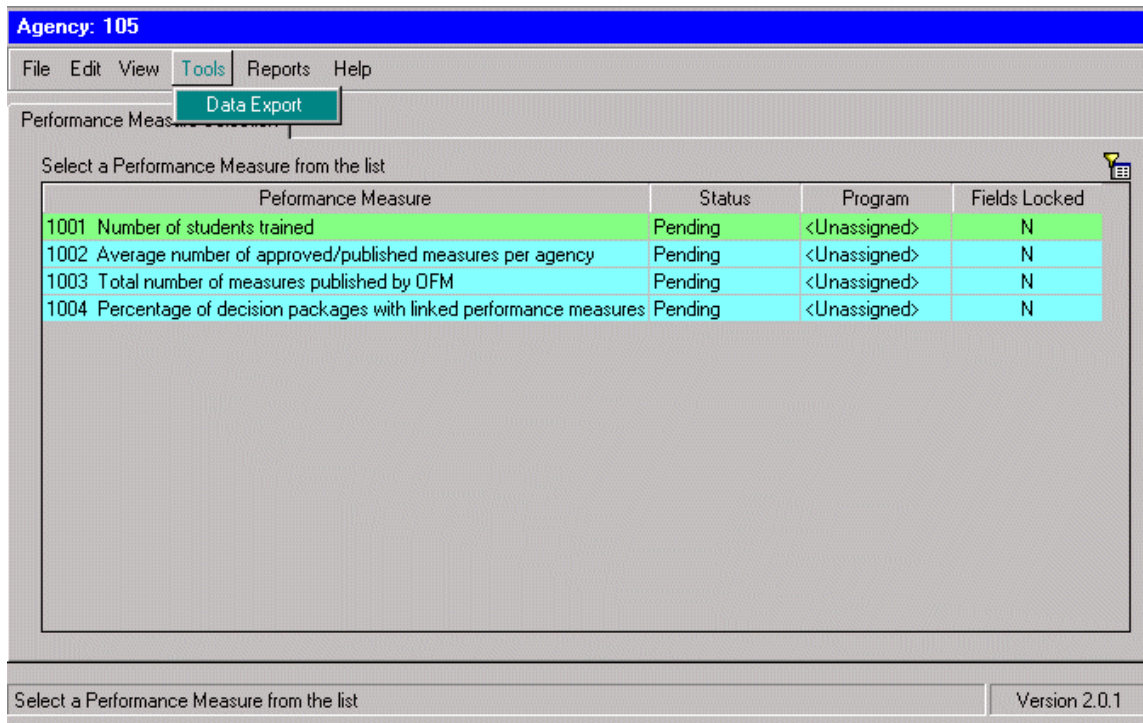


10. Review the resulting report.

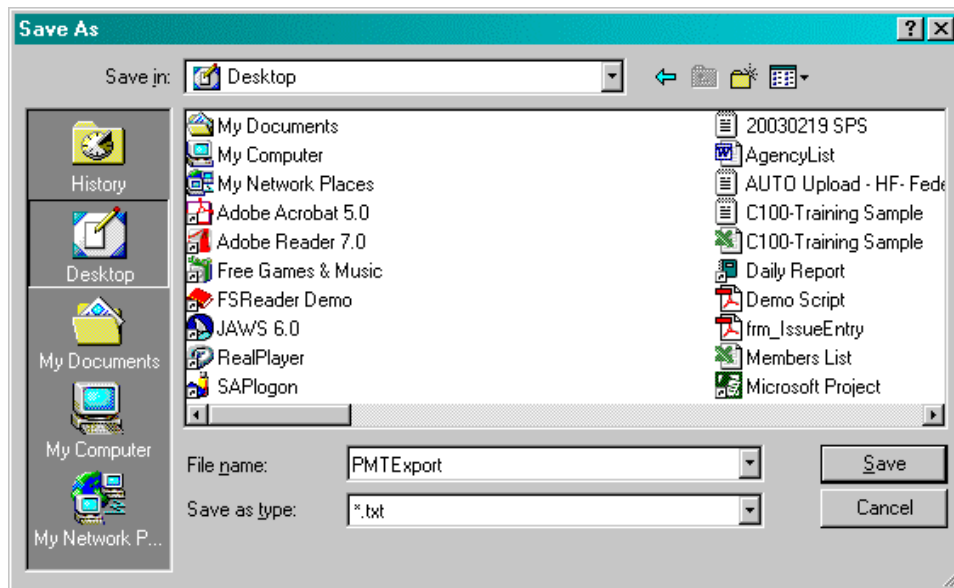
## Lesson 10 – Export Data

PMT also has the ability to export measures for use in Excel or for importing to an internal agency system. This lesson will provide basic instruction to exporting. It is the assumption that someone working with the exported data will understand the advanced functions of excel for analyzing datasets or importing data into other software or systems.

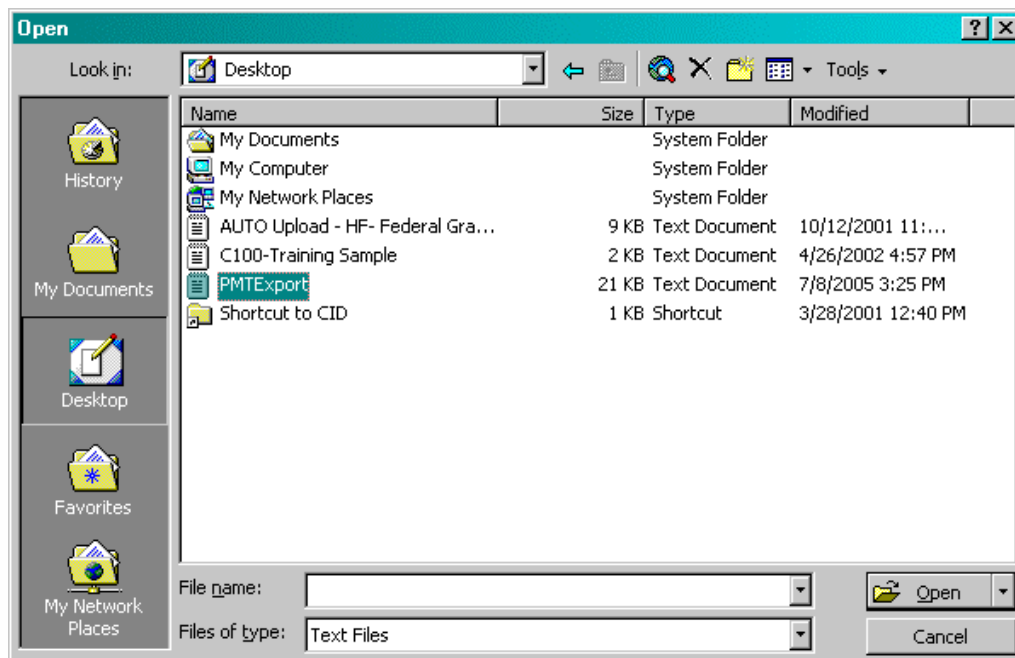
1. Close all Enterprise Reporting windows and return to PMT.
2. Select **Tools / Data Export** from the **PMT Menu** bar.



3. Use the **Save As** box to select a location and name for the exported file and click **Save**.

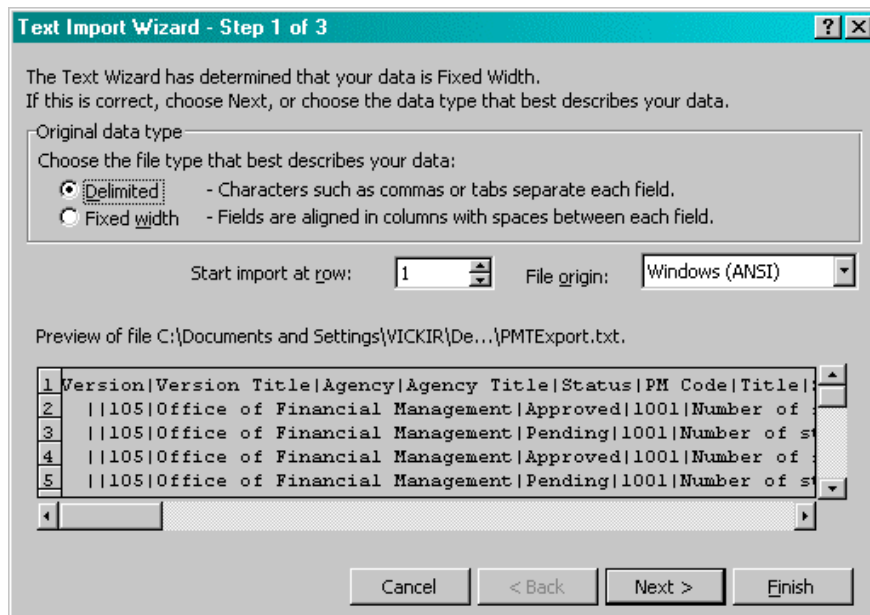


4. Open **Excel**.
5. Select **File / Open**.

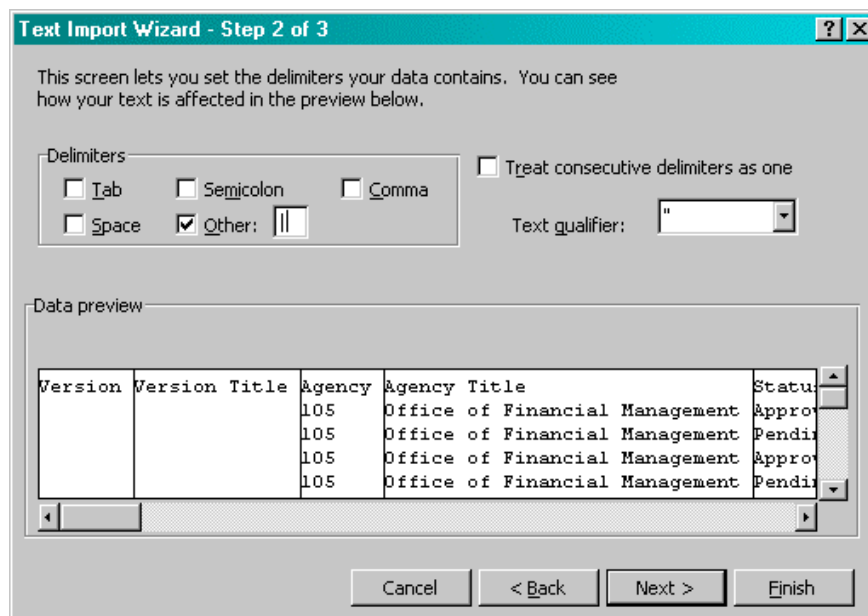


6. Change the **Files of type** to **Text Files**.
7. Point the **Look in:** to the directory you saved the export in step 3 and click **Open**.



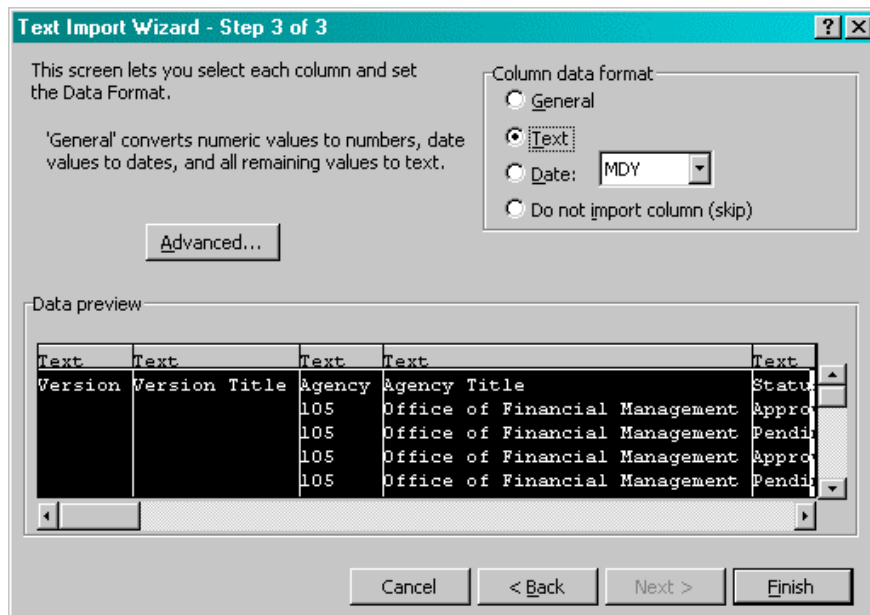


8. Select the **Delimited** option on the import screen then **Next >**.



9. Uncheck the box next to **Tab**, check the box for **Other** then type a | in the blank box. The | is called a pipe delimiter. The keystroke is **Shift - \** above the **Enter** key.
10. Click **Next >**.
11. With the first column highlighted, click the shift key and scroll all the way to the right and click the last column. This should highlight all columns.
12. Select **Text**. *Note: There are three columns you would actually want to have as **General**. You may find it easier to import it all as text then change the Budget, Estimate, and Actual columns to numeric values if needed later.*





13. Then select **Finish**.

14. You should now have all of your performance measures in Excel. You can filter, organize, sort, pivot table, chart, etc. This data can also be imported into another system or Access.

# APPENDIX 1 - BUSINESS NOTES

## Detail

- Programs available for performance measures are defined by programs in AFRS
- You need to either add a performance measure to match the filter selected or change the filter to continue with the Performance Measure Detail screen when the no existing records match the filter selected.
- While you can navigate between tabs for the same measure without saving, you are required to save before moving to another measure.
- A performance measure is not deleted until you save changes.

## Status

- A new measure has a status of “Edit”. This is because the measure has not yet been submitted to OFM. More on performance measure status in **Lesson 3 – Performance Measure Filter**.
- PMT assumes a hierarchy of how to display measures so you see only one copy when multiple statuses have been selected in the filter. The filter allows you to establish the status you to set the statuses to view by selecting one status at a time.
- **Approved** measures will become **Edit** measures once you enter the tracking estimates. Tracking is not required for **OFM Inactive** or **Unapproved** measures.
- All performance measures that had a status of **Edit** now have a status of **Pending** once released to OFM. Approved measures retain their status since there were no changes submitted to OFM.
- Any change made to any performance measure will result in a status change to **Edit**.

## Filter

- The default filter for PMT is for measure in **Approved** or **Edit** status and should meet the need for entering tracking amounts.
- PMT assumes a hierarchy of how to display measures so you see only one copy when multiple statuses have been selected in the filter. The filter allows you to establish the status you to set the statuses to view by selecting one status at a time.
- Programs available for performance measures are defined by programs in AFRS.
- You need to either add a performance measure to match the filter selected or change the filter to continue with the Performance Measure Detail screen when the no existing records match the filter selected.
- You may choose to limit the filter to one program if you have a large number of measures segregated by program. But for most agencies selecting all programs will allow you to get all estimates in at one time.

## Release

- Releasing performance measures takes place in the BASS Data Release system. Special security is required for permission to release performance measure data. Users without this special permission will not have access.
- New performance measures will be submitted to OFM has a new proposal when performance measure tracking data is released. This will be covered in **Lesson 5 – Data Release to OFM**.
- All performance measures that had a status of **Edit** now have a status of **Pending** once released to OFM. Approved measures retain their status since there were no changes submitted to OFM.
- You can recall a measure to adjust the amounts entered by following the steps in **Lesson 6 – Recall a Released Measure**.

## Tracking

- **Approved** measures will become **Edit** measures once you enter the tracking estimates. Tracking is not required for **OFM Inactive** or **Unapproved** measures.
- **Date Measured** and **Comments** are intended for optional use when entering actual performance measures. This will be covered in **Lesson 8 – Enter and Submit Quarterly Actuals**.
- The date of the last quarter measured will appear on reports when a date is entered.
- The comments of the last quarter measured will appear on reports when a comment is entered.

## Reports

- It is not required that you go to PMT to get performance measure reports. You can go straight to Enterprise Reporting with your browser and log in as you normally would for Fastrack reports.
- The date of the last quarter measured will appear on reports when a date is entered.
- The comments of the last quarter measured will appear on reports when a comment is entered.
- Clicking the **Add** button next to any field on the report selection screen will add all selections made in this screen to the report parameters.

## Export

- There are three columns you would actually want to have as General. You may find it easier to import it all as text then change the Budget, Estimate, and Actual columns to numeric values if needed later.

# TUTORIAL EVALUATION

## PMT Quarterly Tracking

	Strongly Disagree			Strongly Agree	
This tutorial was helpful in getting me through the business process	1	2	3	4	5
This tutorial was helpful in getting me through the system technical processes	1	2	3	4	5
Additional training was not necessary given the structure and content of this tutorial	1	2	3	4	5
The steps of the tutorial successfully anticipated the special needs of my agency	1	2	3	4	5
The tutorial was clear, concise, and easy to understand	1	2	3	4	5
I did not need to request additional assistance to complete the business process	1	2	3	4	5
It was easy to find answers to my specific question in this tutorial	1	2	3	4	5

The best feature of this tutorial is: \_\_\_\_\_

The worst feature of this tutorial is: \_\_\_\_\_

I found errors (grammar, punctuation, spelling, conceptual, technical) on the following pages:

\_\_\_\_\_

Other comments: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Thank you for taking the time to complete this survey. This information will be used in revising this tutorial as well as developing future BASS tutorials. Please remit to:

Office of Financial Management  
Attn: Vicki Rummig  
Mailstop: 43113  
Olympia, WA 98504  
Or fax 360 586-3964